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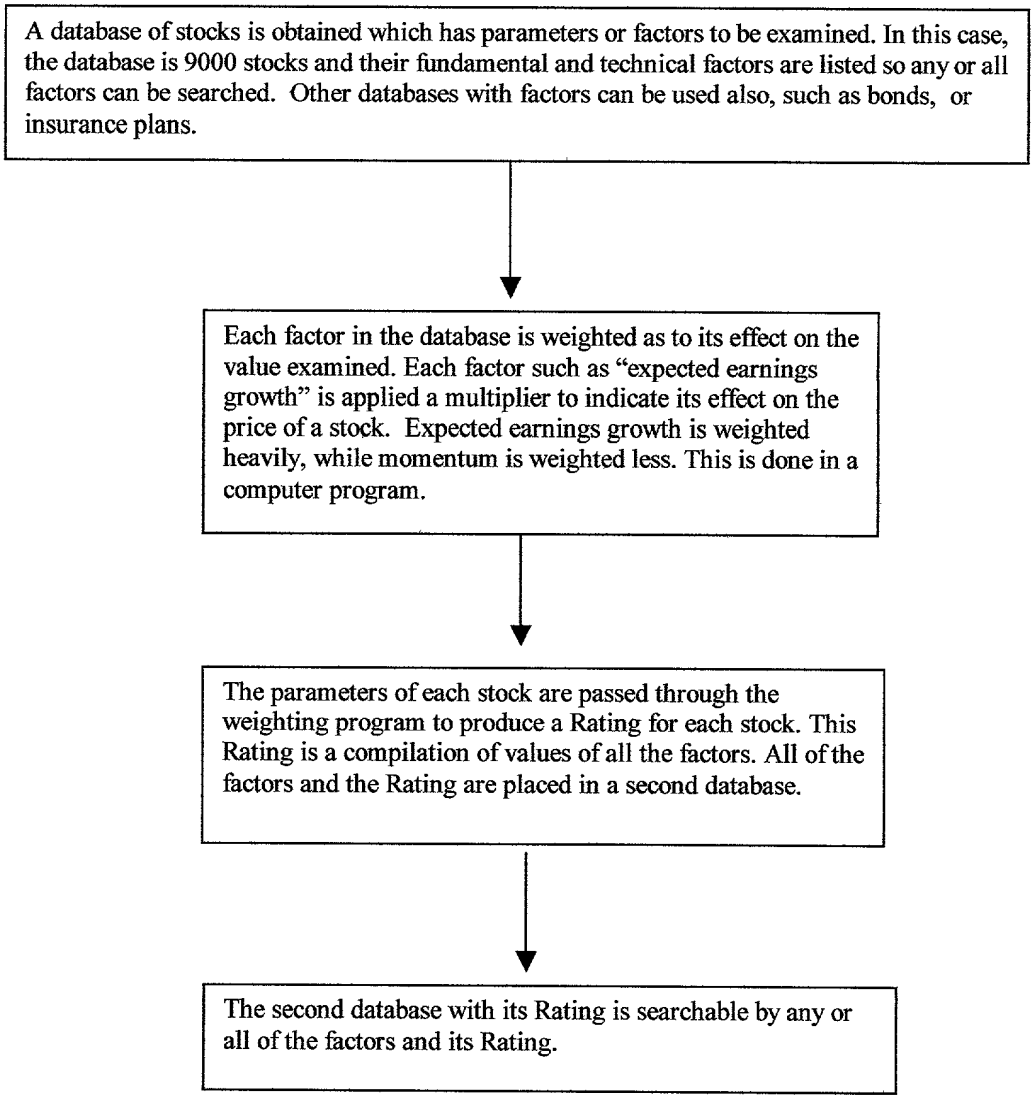

FIG. 1

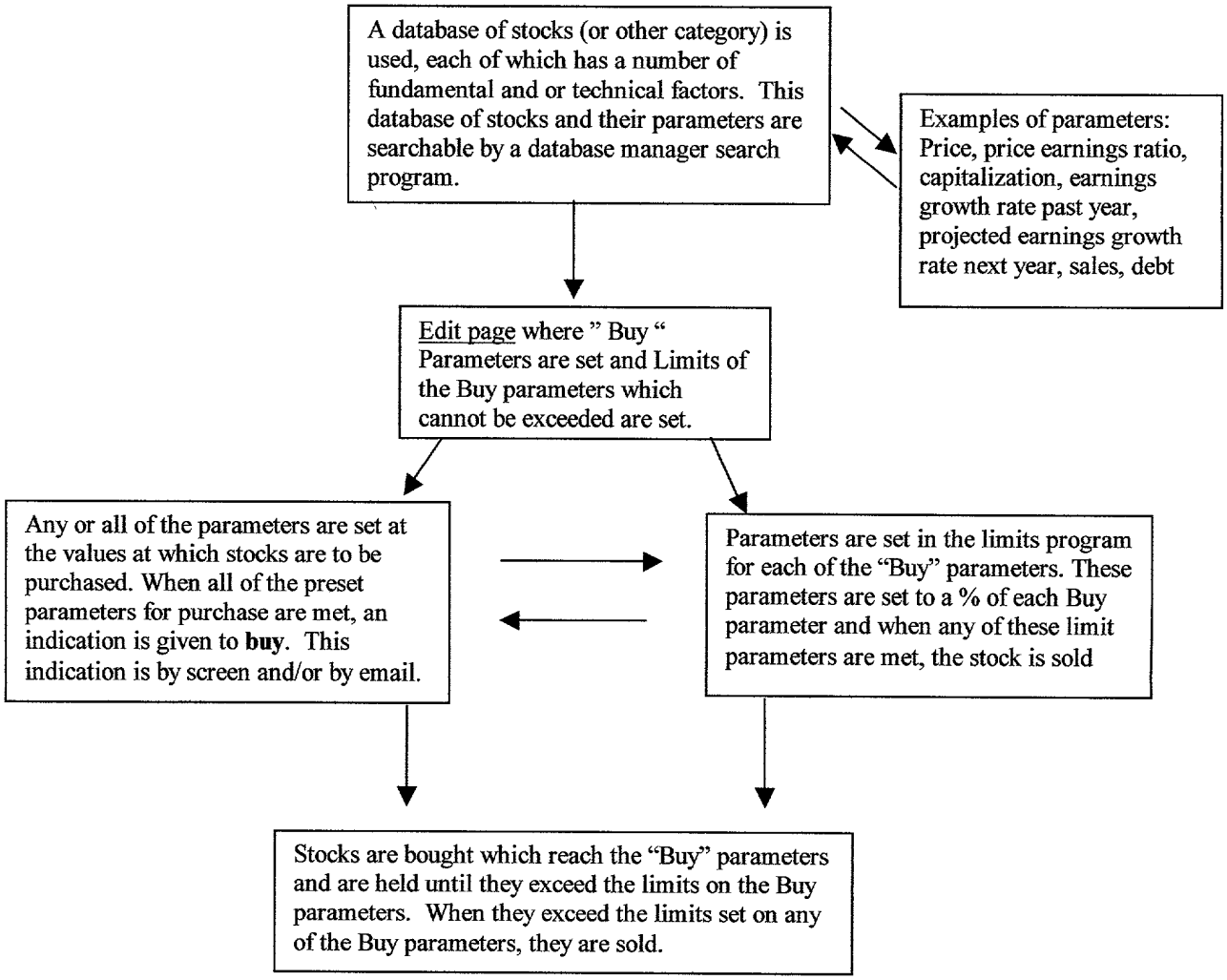
A database of stocks (or other category) is used, each of which has a number of fundamental and or technical factors. This database of stocks and their parameters are searchable by a database manager search program.
Examples of parameters: Price, price earnings ratio, capitalization, earnings growth rate past year, projected earnings growth rate next year, sales, debt
Edit page where " Buy " Parameters are set and Limits of the Buy parameters which cannot be exceeded are set.
Any or all of the parameters are set at the values at which stocks are to be purchased. When all of the preset parameters for purchase are met, an indication is given to buy. This indication is by screen and/or by email.
Parameters are set in the limits program for each of the "Buy" parameters. These parameters are set to a % of each Buy parameter and when any of these limit parameters are met, the stock is sold
Stocks are bought which reach the "Buy" parameters and are held until they exceed the limits on the Buy parameters. When they exceed the limits set on any of the Buy parameters, they are sold.

FIG. 2

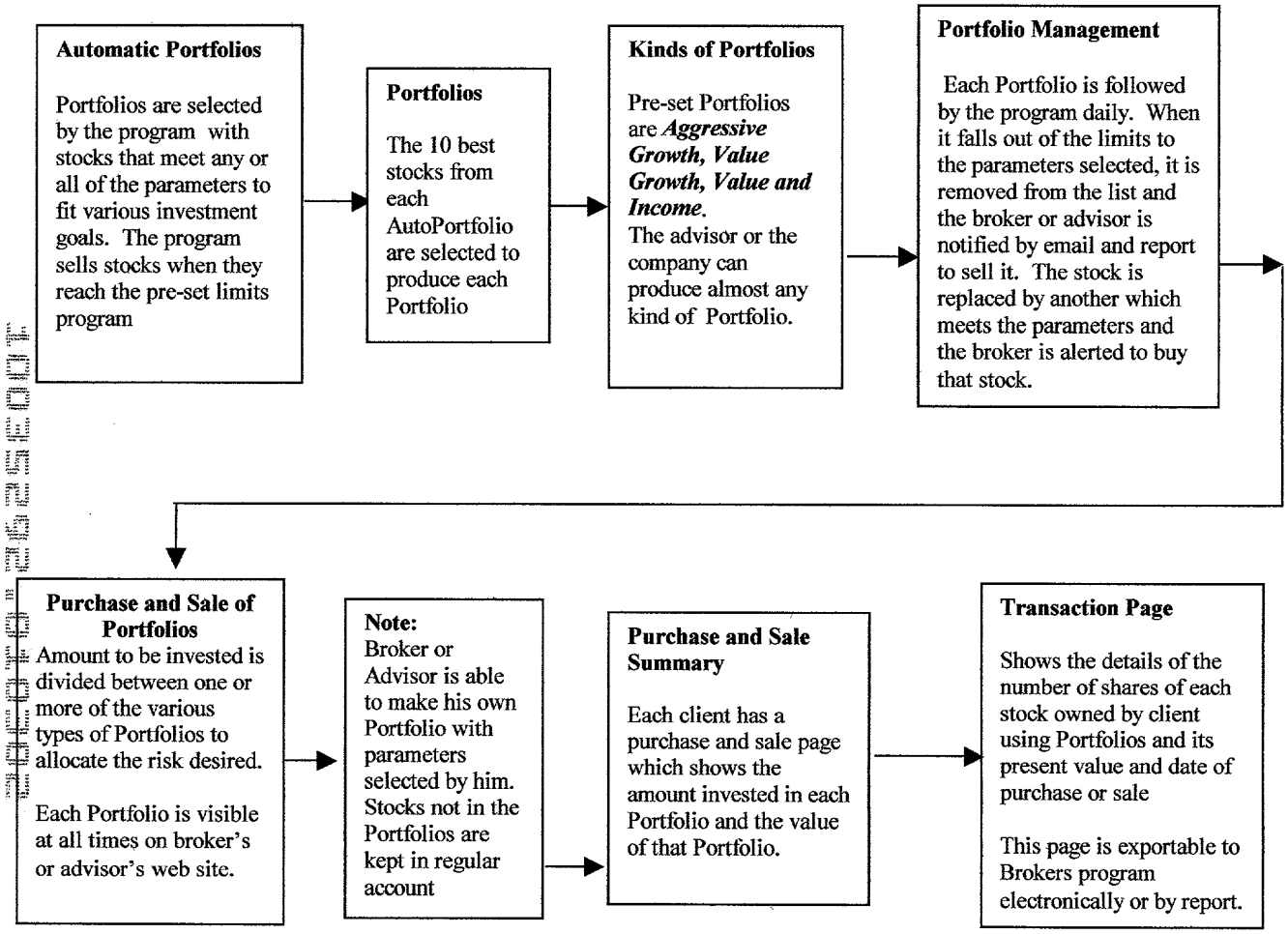
Automatic Portfolios
Portfolios are selected by the program with stocks that meet any or all of the parameters to fit various investment goals. The program sells stocks when they reach the pre-set limits program
Portfolios
The 10 best stocks from each AutoPortfolio are selected to produce each Portfolio
Kinds of Portfolios
Pre-set Portfolios are Aggressive Growth, Value Growth, Value and Income.
The advisor or the company can produce almost any kind of Portfolio.
Portfolio Management
Each Portfolio is followed by the program daily. When it falls out of the limits to the parameters selected, it is removed from the list and the broker or advisor is notified by email and report to sell it. The stock is replaced by another which meets the parameters and the broker is alerted to buy that stock.
Purchase and Sale of Portfolios
Amount to be invested is divided between one or more of the various types of Portfolios to allocate the risk desired.
Each Portfolio is visible at all times on broker's or advisor's web site.
Note:
Broker or Advisor is able to make his own Portfolio with parameters selected by him. Stocks not in the Portfolios are kept in regular account
Purchase and Sale Summary
Each client has a purchase and sale page which shows the amount invested in each Portfolio and the value of that Portfolio.
Transaction Page
Shows the details of the number of shares of each stock owned by client using Portfolios and its present value and date of purchase or sale
This page is exportable to Brokers program electronically or by report.

FIG. 3